



SitePad Reference Guide

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Credit

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1. Introduction

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1.1 Document Structure

The SitePad Reference Guide is a reference document for users of the AASHTO SitePad application. The user should refer to this manual only when a question cannot be answered by SitePad's on-line help system. This manual describes all of the SitePad components, including their purpose, functions, and how to use them.

The manual's main sections are described below.

Section 1 Introduction

The Introduction describes the structure and objective of this manual. Refer to this section for an overview of the manual's topics or to find out how this manual is intended to be used. This section also includes a brief introduction to the SitePad application, as well as a short orientation to Palm-compatible devices.

Section 2 Getting Started

The Getting Started section includes information to help the user get started with SitePad. This includes information about starting and exiting SitePad and basic navigation within the application.

Section 3 General Concepts

The General Concepts section includes descriptions of the menus and functions that are common throughout the application. It also includes procedures for using the on-line help system.

Section 4 Check Out

The Check Out section describes the procedures for the exchange of data from SiteManager to SitePad.

Section 5 Recording DWR Data

The Recording DWR Data section includes information on entering information into SitePad.

Section 6 Check In

The Check In section describes the procedures for the exchange of data from SitePad back to SiteManager.

Section 7 Index

A topical index assists the user in finding topic-specific information or instructions.

1.2 Overview

AASHTO Trns•port SitePad is a Palm OS-based field data collection application intended for use as a component of the SiteManager Construction Management System. SitePad has been designed to run on hand-held devices that utilize the Palm operating system platform.

SitePad supports the collection of an inspector's field data in Daily Work Reports, and provides a conduit program for exchanging required data with SiteManager. The type of data collected in the SitePad application is based upon SiteManager's Daily Work Report (DWR) function.

The following two functionalities are featured in SitePad:

- A Palm OS-based, hand-held application for collecting data in the field
- A conduit program for transferring SiteManager specific data from SiteManager to SitePad and vice versa.

The conduit program is responsible for transferring data to and from the handheld device and converting the data to the appropriate format for the data's final destination. The conduit program is initiated whenever the user places the handheld device in the hardware cradle and presses the synch button on the cradle. Pressing the synch button starts the Palm Conduit Manager, which controls the synchronization process.

SitePad presents a series of forms to the user. Each form either serves as a place to enter or view data or by offering selections from which to choose, provides the ability to navigate between data entry forms. The following forms make up SitePad:

- The SitePad logon form.
- The DWR Info form, which contains date and time information for the DWR
- The DWR Weather form, which contains weather information for the DWR
- The Staff form, which allows the user to select or add a staff person to the DWR
- The Staff Details form, which contains information about a staff person
- The DWR Remarks form, which allows the user to view or enter one or more remarks to the DWR.
- The Contractors form, which allows the user to select a contract
- The Supervisors form, which allows the user to select a supervisor to view or to add to the DWR
- The Supervisor Details form, which contains information about a supervisor
- The Supervisor Remarks form, which allows the user to view or enter remarks about a supervisor
- The Personnel form, which allows to user to select a personnel category to view or to add to the DWR
- The Personnel Details form, which contains information about a Personnel category
- The Personnel Remarks form, which allows the user to view or enter remarks about personnel
- The Equipment form, which allows the user to select an equipment category to view or to add to the DWR

- The Equipment Details form, which contains information about an Equipment category
- The Equipment Remarks form, which allows the user to view or enter remarks about equipment
- The Item List form, which lists all items for selection
- The Item Locations form which allows the user to select and item placement location to add or to view
- The Stationing form, which contains information about an item placement
- Three Item Info forms that contain information about an item
- Two Item Stockpile forms that contain information about an item stockpile
- The Item Remarks form, which allows the user to view or enter remarks about an item placement
- The Contracts form, which allows the user to select a contract
- The DWRs form, which allows the user to select a DWR
- Various support dialogs and forms

1.3 The Palm OS Environment



A Palm-Compatible Hand-Held Device
Figure 1-1

There are many companies that manufacture and distribute Palm-compatible devices. Figure 1-1 above is a generic representation of a Palm-compatible device. The items identified in Figure 1-1 are described in the table below.

ITEM	DESCRIPTION
SitePad icon	Opens the SitePad application.
Applications icon	Displays the application launcher.
Menu icon	Displays the menu bar options for an application.
Power On/Off	Turns power on or off. In some models, this button also operates a screen back light for use in dim lighting conditions.
Programmable application buttons	Although these buttons come pre-programmed to launch various pre-installed applications, they may be reconfigured to launch other applications, such as SitePad. See your device's user guide for more details on this feature.
Scroll button	On some devices, this may be two buttons instead of one.
Find icon	Launches the Find application, allowing the user to find files quickly.
Calculator icon	Launches the calculator application.
Graffiti writing area	This area is for the entry of data using the stylus.

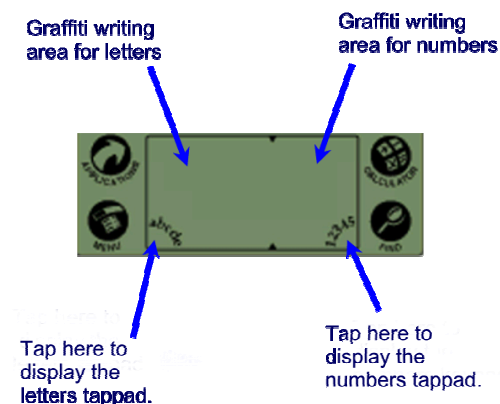
The Palm Environment
Table 1-1

1.3.1 Data Entry

There are two methods of entering alphabetic and numeric characters into applications in the Palm environment: by using the Graffiti writing area or by using the alphabetic and numeric tappads. The Graffiti handwriting recognition software resident in the Palm OS allows the user to enter alphanumeric data simply by writing. The alphabetic and numeric tappads allow data to be entered by tapping the desired characters with the stylus. Both are described briefly in the following sections. For more extensive information on this topic, please consult your device's user guide.




1.3.1.1 The Graffiti Writing Area

Entry of alpha and numeric data may be performed by the user in the Graffiti writing area. The exact location of this area may be seen in Figure 1-1.



The Graffiti Writing Area
Figure 1-2

As seen in Figure 1-2, the left-hand side of the Graffiti writing area is reserved for entering letters, and the right-hand side is reserved for entering letters. The sections are divided by small, triangular division marks. In each lower corner of the Graffiti writing area is a small area that may be tapped to display the data entry tappads.

CHARACTER	DESCRIPTION
	The Enter button is like the Enter key on a keyboard. It returns the insertion point to the next line.
	The Backspace button is like the Backspace key on a keyboard. It deletes the character to the left of the insertion point.
	The Tab button is like the Tab key on a keyboard. It moves the insertion point five character spaces to the right. If you are in an alpha or numeric entry field in SitePad and want to move to the next alpha or numeric entry field, tapping the Tab key will move you to the next field.

The Special Characters of the Tappads

Table 1-2

1.3.1.2 Using Graffiti

The quickest method for entering data in the Palm environment is Graffiti. Using the stylus, the user simply writes the data in the appropriate section of the Graffiti writing area. Graffiti is similar to regular printing, but has some unique differences in strokes used to form the characters. The table below illustrates how each alphanumeric character should be formed. The heavy dot on each shape indicates the beginning of the stroke.

GRAFFITI	LETTER	GRAFFITI	LETTER	GRAFFITI	NUMBER
	A		N		0
	B		O		1
	C		P		2
	D		Q		3
	E		R		4
	F		S		5
	G		T		6
	H		U		7
	I		V		8
	J		W		9
	K		X		
	L		Y		
	M		Z		

Graffiti Letters and Numbers
Table 1-3

GRAFFITI	PUNCTUATION	GRAFFITI	OPERATOR	GRAFFITI	FUNCTION
	Punctuation Shift		=		Enter
	Period		/		Space
	Comma		+		Backspace
	Open Parenthesis		-		Tab
	Close Parenthesis		*		

Graffiti Punctuation, Operators, and Functions

Table 1-4

Note: Graffiti includes any character you can type on a standard computer keyboard. For more details on how to form additional symbols and text, please refer to your device's user guide.

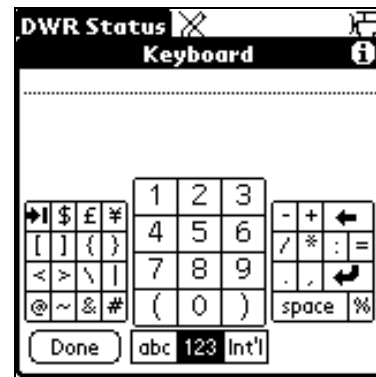
Tip: Some Palm-compatible devices include a game that allows users to practice writing Graffiti characters. See individual device user guides for more information.

1.3.1.3 Using Tappads

On-screen tappads may also be used to enter data. There are two separate tappads - an alphabetic tappad and a numeric tappad. To display a tappad, tap the stylus in the appropriate corner of the Graffiti writing area (see Figure 1-2). When you are finished, tap the Done button.



The Alphabetic Tappad
Figure 1-3



The Numeric Tappad
Figure 1-4

To enter alphabetic and numeric characters using the tappads:

1. Tap the **alphabetic** icon in the left corner of the Graffiti writing area; or the **numeric** icon in the right corner of the Graffiti writing area.
2. Tap the desired letters or numbers on the tappad.
3. To switch between the alphabetic and numeric tappads, tap either the **abc** button or the **123** button.
4. When finished, tap the **Done** button.

For more information on how to use the alpha and numeric keypads, please refer to your device's user guide.

2. Getting Started

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2.1 SitePad Overview

2.1.1 Field Data Collection

SitePad is intended for use by inspectors in the field. Data that may be collected and recorded consists of the following:

- Weather conditions
- Work suspend/resume times
- Remarks
- Contractor information
- Daily Staff information
- Contractor Supervisor details
- Contractor Equipment details (including remarks)
- Installed work item information

Other information that may be displayed on SitePad forms includes the DWR authorization indicator and DWR authorization date. Contractor and Daily Staff information may be copied from an existing DWR to a new DWR, including any associated remarks. The data that may be collected when recording Installed Work consists of plan page number, additional stationing information, measured indicator, and selection of a subcontractor for a particular work item. Remarks may be entered for each item installed. Access to unit pricing may also be displayed, depending upon the assigned security attributes for individual users.

SitePad's field data collection application is not intended to replace the Daily Work Report function of SiteManager. SitePad currently does not support such DWR functions as force accounts, OLE documents, DWR templates, or Plug-Ins. Although information such as Contractors and Installed Work can be recorded in SitePad, these previously mentioned functions must be carried out utilizing SiteManager's more complete Daily Work Report functionalities.

2.1.2 SiteManager to SitePad Data Synchronization

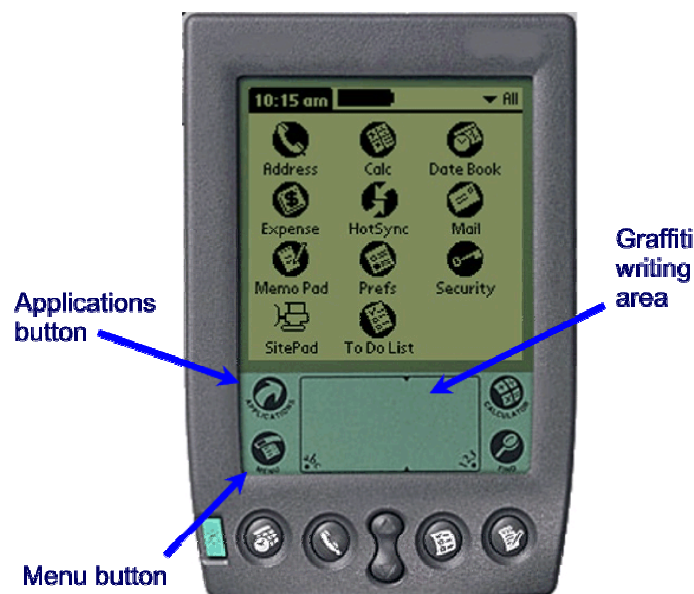
The Palm OS environment terms the program responsible for transferring data to and from the handheld device a conduit. When data is to be transferred to the Palm, the conduit is responsible for creating data records in a specific format used by the Palm database facility. The conduit program is initiated whenever the user places the handheld device in the hardware cradle and presses the synch button on the cradle. The conduit will only download active equipment, supervisors, personnel and items for a contract. DWRs created by other inspectors will be downloaded as read-only and will be available for review or for copying.

2.2 Starting and Exiting SitePad

2.2.1 Starting SitePad

SitePad has been designed to run on hand-held devices that utilize the Palm operating system. You will start SitePad the same way you would any application on your Palm-compatible hand-held device.

The SitePad application is located with its own icon (a bulldozer) displayed in the Application Launcher, as illustrated in Figure 2-1.



Application Launcher Screen
Figure 2-1

To start the SitePad application:

1. Tap the **Application** button on the data entry area of the handheld's screen. The Application Launcher will appear.
2. Tap the **SitePad** icon. The SitePad Logon form will appear.
3. Tap the **Password** field.
4. In the Graffiti entry area, enter your password.
5. Tap the **Logon** button.

SitePad Logon

AASHTO SitePad

Userid: SitePadUser

Password: I.....

Logon

SitePad Logon Form
Figure 2-2

The Logon Form's User ID field is not editable in SitePad. The User ID is specified at the time data is downloaded to the handheld device. The password will display when entered by the user, since Graffiti is more error-prone than a traditional keyboard. Passwords may not be changed in SitePad. To change a password, the change must be made in SiteManager, and the new password will be passed to SitePad at the next synchronization.

2.2.2 Exiting SitePad

The Action menu's Exit SitePad choice allows you to end your SitePad work session and exit the application. It is not always necessary to exit SitePad when turning off the handheld device. When the device is turned off, the same form appears when the device is turned back on.

Actions Menu on Menu Bar
Figure 2-3

To exit the SitePad application:

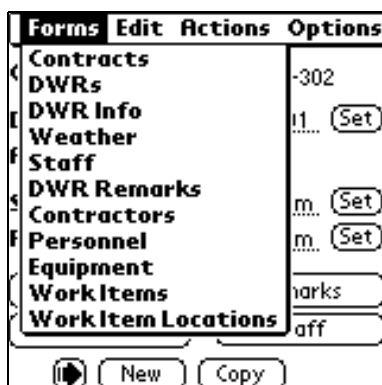
1. Tap the **Menu** button on the data entry area of the handheld's form. The menu bar will appear.
2. Tap the **Actions** choice on the menu bar, then tap the **Exit SitePad** menu choice.
3. Tap the **Yes** button.

SitePad Logout Form
Figure 2-4

2.3 Navigating in SitePad

2.3.1 The Menu Bar

The Menu bar is used to navigate through the various functions of the SitePad application. Each item on the menu bar has an associated drop-down menu that lists the functions associated with that item.



The Menu Bar
Figure 2-5

To display the Menu bar:

1. Tap the **Menu** button on the data entry area of the hand-held device.

Menu items and their corresponding choices are listed below:

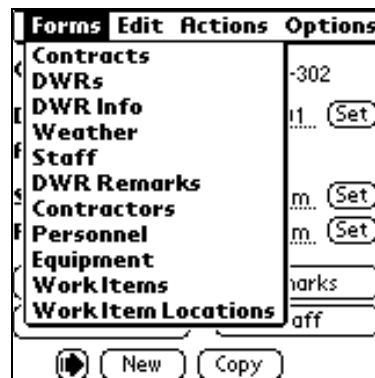
MENU ITEM	CHOICES
Forms	Contracts DWRs DWR Info Weather Staff DWR Remarks Contractors Personnel Equipment Work Items Work Item Location
Edit	Undo Cut Copy Paste Select All Keyboard Graffiti
Actions	Exit SitePad Mark DWR to Check In
Options	About SitePad

The Menu Items Table
Table 2-1

3. General Concepts

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3.1 Menus



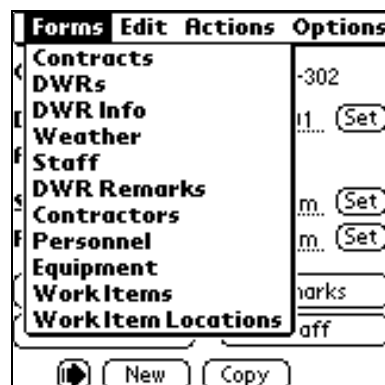
An Example of SitePad Menus
Figure 3-1

3.1.1 General Guidelines

The following guidelines apply to the use and structure of SitePad.

- All of SitePad's data entry functions are located in the Forms Menu.
- Tapping the bulldozer in the upper right of all SitePad forms will display the currently selected contract information.
- Remarks are available on several forms - general DWR remarks, Staff, Equipment, Work Items, and Supervisors.
- Functions available on the Contractors List form can also be accessed through the Forms menu.
- All Daily Work Report information may be recorded in SitePad except Force Accounts, DWR Templates, External Documents, and Plug-Ins.
- Tapping the Back button on any form where it is available will navigate back to the previous form.

3.1.2 Forms Menu



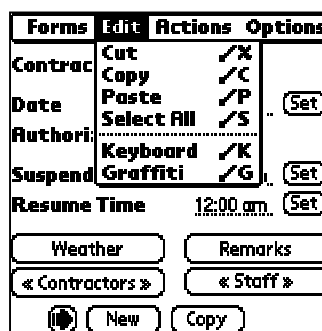
The Forms Menu
Figure 3-1

The Forms menu allows the user to navigate to SitePad's functional areas. The following table documents the choices associated with the Forms menu item:

MENU CHOICE	DESCRIPTION
Contracts	Displays a list of all contracts currently loaded into the hand-held device. The user must have more than one contract loaded into the device to use this form.
DWRst	Displays a list of all Daily Work Reports associated with a particular contract that is currently loaded into the hand-held device.
DWR Info	The main Daily Work Report information form.
Weather	Allows the user to enter Weather-related data for a particular Daily Work Report.
Staff	Displays the Staff Member master list for the current contract.
DWR Remarks	Displays the DWR Remarks form, where general remarks may be entered.
Contractors	Lists the contractors and subcontractors available for the contract selected.
Personnel	Displays the Personnel master list for the current contract.
Equipment	Displays the Equipment master list for the current contract.
Work Items	Displays the list of work items available for the selected contract.
Work Item Location	Displays the Location list for the current contract

Forms Menu Choices
Table 3-2

3.1.3 Edit Menu



The Edit Menu
Figure 3-2

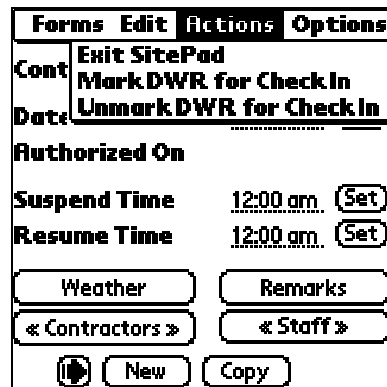
The Edit menu contains those commands which are common to most Palm OS applications. The following table documents the choices associated with the Edit menu item:

MENU CHOICE	DESCRIPTION
Undo	Reverses the action of the last edit command.

Cut	Removes highlighted text and makes it available to paste elsewhere.
Copy	Copies highlighted text and makes it available to paste elsewhere.
Paste	Inserts text that was either cut or copied at a selected point.
Select All	Selects all text on the current record or form for the purpose of cutting or copying.
Keyboard	Opens the on-form keyboard for data entry
Graffiti	Opens the help topic for Graffiti character strokes.

Edit Menu Choices
Table 3-3

3.1.4 Actions Menu



The Actions Menu
Figure 3-3

The Actions menu allows the user to log out of SitePad, save a Daily Work Report, mark a DWR for check in, and list messages. The following table documents the choice associated with the Actions menu item:

MENU CHOICE	DESCRIPTION
Exit SitePad	Allows the user to exit the SitePad application.
Mark DWR to Check In	Flags the DWR as ready to check in to the SiteManager database and locks it against further changes.

Action Menu Choices
Table 3-4

3.2 The Current Contract Form

The use of a handheld device differs from using a desktop computer in several ways. One of the differences is that the handheld device must hibernate more often in order to conserve battery power. Also, handheld devices are often closed and reopened without exiting the application. These factors necessitate the ability for the user to be able to quickly identify where he or she left off using the device.

Due to the limited size of Palm OS forms, it is not always possible to display the contract and current user ID information on the current form. To allow the user to view which contract information is currently being viewed, edited, or entered, the Current Contract form is available on every form in SitePad. This read-only information is displayed when the SitePad icon (a bulldozer) is tapped.

UserID	
Contract	000421-302
Fed/St Prj Nbr	FAF 36-3(31) & FAF 36-3(29)
DWR	20010828
Contractor	
Item	
Location	
<input type="button" value="OK"/>	

The Current Contract Form
Figure 3-4

This box displays data for the most currently selected values for the User ID that created the selected DWR as well as the selected Contract, Project, DWR, Contractor, Item, and Location. If any of these values have not yet been selected, the field will be blank. When the user taps OK, the form will close and display the previous form.

FIELD	DESCRIPTION
Userid	The user ID of the person currently logged into the handheld device.
Contract	The transportation agency-defined contract ID of the currently selected contract.
Fed/St Prj Nbr	The Federal or State Project Number
DWR	The date of the DWR.
Contractor	The prime contractor for the currently selected contract.
Item	The most currently selected item.
Location	The last location against which an item was recorded.

Current Contract Form Fields
Table 3-5

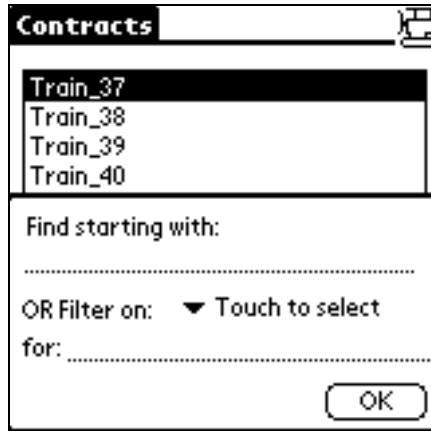
To display the Current Contract form:

1. Tap the **SitePad** icon.
2. When finished viewing the information, tap **OK**.

3.3 Using the Find Function

To make data entry and retrieval easier, SitePad provides a Find capability throughout the application. The Find function provides users with the ability to limit the data retrieved from a list by specifying criteria using the first few characters of an entry, or by filtering criteria applied against a specific field or fields. A list with the capability of using the Find function will have the Find button displayed on the form. Tapping the Find button will display a form where criteria may be entered.

Depending upon the list context, one of two Find forms is available to the user. The Simple Find form appears on all list-type forms except the Item List form, and only allows the user to search on one criteria. The more complex extended Find capability on the Item List form allows the user to Find, Filter, or Sort on a series of differing criteria.

The Simple Find Form is a mobile application interface. At the top, there is a title bar labeled 'Contracts' with a small printer icon on the right. Below the title bar is a list box containing four items: 'Train_37', 'Train_38', 'Train_39', and 'Train_40'. Below the list box is a search section. It starts with the text 'Find starting with:' followed by a dotted line for text input. Below this is the text 'OR Filter on: ▼ Touch to select' followed by another dotted line for text input. At the bottom right of the search section is an 'OK' button.

The Simple Find Form

The Extended Find Form is a mobile application interface. At the top, there is a title bar labeled 'Find or Filter, Sort the Item List'. Below the title bar are three search options, each followed by a dotted line for text input: 'Find item description starting with:', 'OR Find item code starting with:', and 'OR Filter on: ▼ Touch to select for:'. Below these options are two buttons: 'Sort on Item Code' and 'Sort on Item Description'. At the bottom right is an 'OK' button.

The Extended Find Form

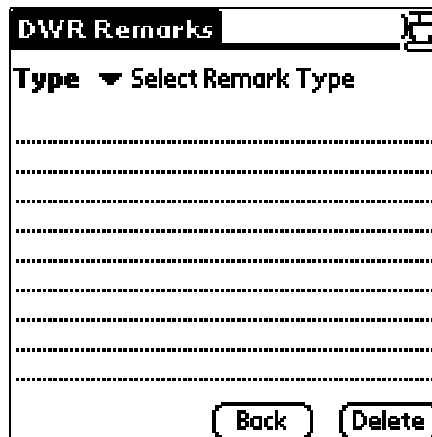
To Find a list entry (simple Find):

1. Tap the **Find** button.
2. Tap the **Find Starting With** field and input the desired text.
3. Tap **OK**.

To Find, Filter, or Sort the Item List (extended Find):

1. Tap the **Find** button.
2. Tap the **Find Item Description starting with** field and input the desired text.
OR
Tap the Find Item Code starting with field and input the desired text.
OR
Tap the down arrow to the left of the **Filter Fields** label and tap the desired field. Tap the **for** field and input the desired text.
3. Tap **OK**.

3.4 Remarks



The DWR Remarks Form
Figure 3-5

Remarks are available on several SitePad functions. Remarks may be entered for Staff, Supervisors, Equipment, Work Items, and general DWR remarks. General DWR remarks have a drop down list of remark types that may be entered individually. When remarks are existing, the remark type will have a small square indicator to the left of it. When entering remarks of any kind, it is helpful to keep in mind that the maximum size of any remarks field is 32 KB.

To enter a DWR remark:

1. On the DWR Info form, tap the **Remarks** button.
2. In the **Type** droplist, click the expand arrow to the left of the list label and tap the desired Remark type.
3. Tap the first line of Remark entry area and enter the desired text.

3.5 Special Function Buttons

3.5.1 Set Button

The set button activates a form which, depending upon the type of field is being entered, displays either a time setting function or a calendar function. The data being entered can be selected on either of these displays and will automatically be transferred to the field.

The Set Date form displays a calendar for the year 2001. The months are listed at the top: Jan, Feb (selected), Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec. Below the months is a grid of dates. The days of the week are listed at the top of the grid: Sun, Mon, Tue, Wed (selected), Thu, Fri, Sat. The dates are arranged in a grid, with the 28th of February highlighted. At the bottom of the form are two buttons: 'Today' and 'Cancel'.

The Set Date Form
Figure 3-6

The Set Time form displays a time setting interface. At the top, the text 'Set Time' is shown. Below this, the time '04:08' is displayed, followed by two arrow buttons (up and down) and two buttons labeled 'AM' and 'PM'. At the bottom of the form are two buttons: 'OK' and 'Cancel'.

The Set Time Form
Figure 3-7

To set a date using the Set feature:

1. Tap the **Set** button. The Set Date form will appear.
2. To set the year, tap either the ◀ or ▶ buttons to scroll to the desired year.
3. Tap the desired month, and tap the desired date.

Tip: To select today's date, tap the Today button. The default value for date fields in SitePad is the current date.

To set a time using the Set feature:

1. Tap the **Set** button. The Set Time form will appear.
2. To set the time, tap the up or down arrow keys to the right of the time field.
3. Tap the **AM** or **PM** button, and tap **OK**.

Tip: The current time is the default value for time fields. The time format is defined by system settings.

3.5.2 ⊕ Button

When a user taps the ⊕ button next to a field, a list of the last 10 entries of the same type entered by the user on this handheld, regardless of contract or DWR, will display for selection. For example, when the user taps the ⊕ button next to the Work Code field, a list of the last 10 work codes entered will display. The user may then select a work code from the list to be entered into the field. This option is available on various fields throughout SitePad.

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4. Check Out

November 2001

4.1 Overview

Just as Pipeline & Zip is used to transfer data to and from a laptop so that an Inspector or Project Manager can work in Standalone mode, Pipeline & Zip is also used to transfer data to and from SitePad.

To create convert data from the Pipeline & Zip process into SitePad compatible data, two SitePad utilities will be used:

- Make XML
- Make Zip

Additionally, the Palm desktop application must also be used to synchronize the data.

WARNING!

You must complete a Palm synchronization as well as run MakeZip prior to installation new contract data on the Palm. Failure to do so may result in loss of data.

The following table shows how the Project Manager and Inspector use the Pipeline and Zip panels to transfer data.

Process	Pipeline and Zip Panel	Other component
Step 1 The Project Manager/Inspector selects and downloads: Contracts DWR's User ID's The Project Manager/Inspector copies the SZP file to a secure location.	Server to PM Pipeline panel	--
Step 2 The Project Manager/Inspector zips: Contracts DWR's	PM to Inspector Zip panel (standalone connection)	--
Step 3 The Project Manager/Inspector converts to an XML format: Contracts DWR's Reference data	--	SitePad Make XML Utility
Step 4 The Project Manager/Inspector synchronizes the checked out data with the handheld		Palm Desktop
Step 5 The Project Manager/Inspector uses the data on the handheld to record data	--	--
Step 6 The Project Manager/Inspector <i>checks</i> the DWR for Check In	--	SitePad

Process	Pipeline and Zip Panel	Other component
Step 7 The Project Manager/Inspector synchronizes the data with the workstation	--	Palm Desktop
Step 8 The Project Manager/Inspector converts the XML data into a Zip format	--	SitePad Make Zip Utility
Step 9 The Project Manager/Inspector loads the zip files into the standalone workstation's database.	PM/Inspector's Load panel (standalone connection)	--
Step 10 The Project Manager/Inspector selects and uploads activity data from the standalone workstation to the server.	PM to Server Pipeline panel	--

The Pipeline and Zip Process Table
Table 4-1

4.2 Check Out — Downloading Data from the Server

The Server to PM Pipeline panel lets the Project Manager/Inspector download (check out) data from the server's database to the standalone workstation's database. To download Contract data from the server, the Project Manager/Inspector must first select a Contract and then select any Daily Work Reports to download.

Downloading the Contract brings down the applicable Master Lists from the Server. The Contract will need to be checked out again any time Master Lists are changed on the Server.

User data can be downloaded without selecting a Contract. User data needs to be downloaded whenever the user's security or reference data changes *except* Master Lists.

When a User ID is selected, the Pipeline process will create two Zip files used by SitePad and one optional Zip file that is not used by SitePad. They are:

REFRO00.ZIP

<USERID>00.SZP

<USERID>00.OZP

00 represents a serial number that will increment if the files are not deleted from the Checkout folder after use.

<UserId> represents the person's actual SiteManager ID.

The OZP file is only created if the user has InBox messages and are irrelevant to SitePad since there is no SitePad InBox.

Did You Know?

DWR CANNOT BE DOWNLOAD BY THEMSELVES. THE CONTRACT MUST ALSO BE CHECKED OUT.

The Basic Contract Data includes all Contract data usable by SitePad.

Materials data cannot be downloaded to SitePad.

Contract ID: Description:

☐ Basic Contract Data
☐ Materials

Dianes: Change Orders:
DWRs: Force Accounts:
Users:

PipeLine Status:

The Pipeline Status field shows the activity and complete status of the pipeline process.

The Server to PM Pipeline Summary Folder Tab
Figure 4-1

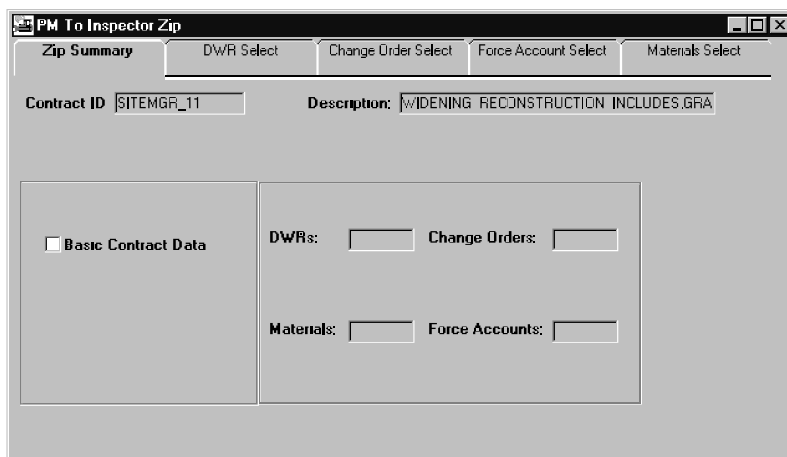
To download data from the server that is applicable to SitePad:

1. When logging on to SiteManager, connect to the Server.
2. On the **SiteManager** main panel, double-click the **Pipeline and Zip** icon.
3. On the **Pipeline and Zip** panel, double-click the **Server to PM Pipeline** icon. The **Pipeline Summary** folder tab is displayed.
4. To select a Contract, click the **Open** button.
5. In the **Contract ID** list box, scroll to and double-click the Contract.
6. To download Basic Contract Data, click the Basic Contract Data check box (ON).
7. In the **DWR** list box, shift-click each Daily Work Report to be downloaded.
8. Click the **Add** button. The selected Daily Work Reports are added to the **Selected DWRs** list.
9. In the **Users** list box, shift-click each User ID to be downloaded.
10. Click the **Add** button. The selected User IDs are added to the **Selected Users** list.
11. Click the **Pipeline Summary** folder tab. The panel displays the total number of Change Orders, Force Accounts, Diaries, Daily Work Reports, and users selected.

4.3 Check Out — Zipping Files for the Inspector

The PM to Inspector Zip panel lets the Project Manager/Inspector zip and transfer (check out) data from the standalone database for the SitePad. The Project Manager/Inspector will only have access to this panel when connected to the standalone database. To zip Contract data for the SitePad, the Project Manager/Inspector must first select a Contract and then select any Daily Work Reports sent.

To select Basic Contract Data, the Project Manager/Inspector must check the Basic Contract Data box

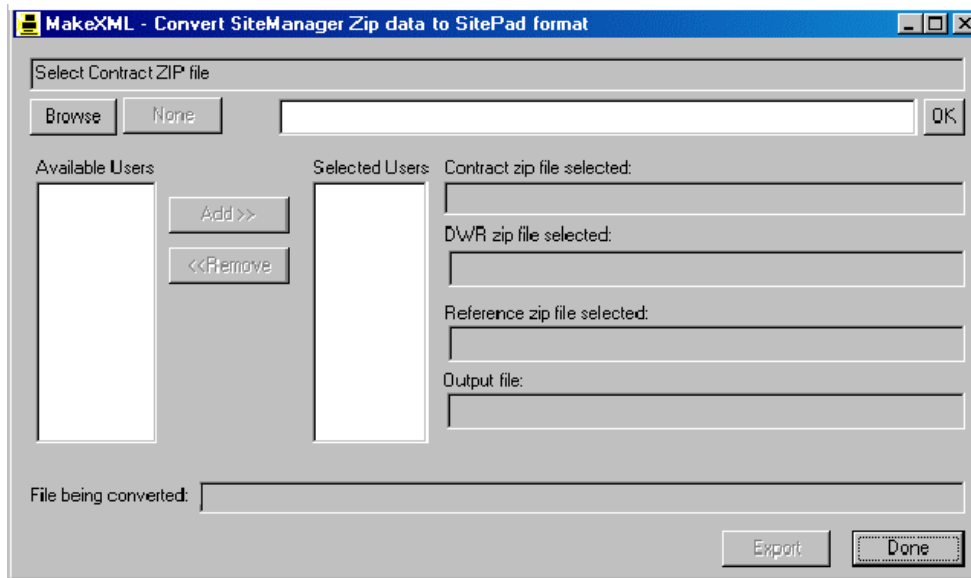


The PM to Inspector Zip Summary Folder Tab
Figure 4-2

To zip files for SitePad:

1. When logging on to SiteManager, connect to the Standalone.
2. On the **SiteManager** main panel, double-click the **Pipeline and Zip** icon.
3. On the **Pipeline and Zip** panel, double-click the **PM to Inspector Zip** icon. The Zip Summary folder tab is displayed.
4. To select a Contract, click the **Open** button.
5. In the **Contract ID** list box, scroll to and double-click the Contract.
6. To zip the Basic Contract Data, click the **Basic Contract Data** check box (ON).
7. To select Daily Work Reports, click the **DWR Select** folder tab.
8. In the **DWR** list box, shift-click each Daily Work Report to be zipped.
9. Click the **Add** button. The selected Daily Work Reports are added to the **Selected DWRs** list.
10. Click the **Zip Summary** folder tab. The panel displays the total number of Daily Work Reports, Change Orders, Force Accounts, and Materials selected.

11. To zip the selected data, click the **Services** menu and click the **Create Zip Files** choice. The selected data is extracted from the Project Manager's workstation. The zip files are created in the C:\smapp\checkout subdirectory.



Make XML Conversion Program
Figure 4-3

4.4 Using the SitePad Desktop Utility -

4.4.1 Using Make XML

In order for SiteManager zip files to be downloaded into SitePad, the zip files must first be chosen by the user and converted to the appropriate SitePad file structure.

The program that converts SiteManager zip files to SitePad data is called **Make XML**. It allows the user to select zip files containing data to be transferred from SiteManager to SitePad.

Once the zip files have been converted, the user is prompted to begin the conversion process again. The process may be repeated as many times as necessary. When the conversion process is complete, the user clicks the Done button to exit the program.

4.4.1.1 Input

The **Make XML** program will initial look to the Checkout directory of the default installed SiteManager directory (usually SMAPP) for its input files.

4.4.1.2 Output

The **Make XML** program requires that the Palm Desktop application be installed first. Make XML will put its output in the correct location for Palm synchronization.

To convert SiteManager data to SitePad data:

1. Click the **Start** menu, click the **Programs** choice, click the **SitePad 1.0a** choice, and click the **Make XML** choice.
2. Click the **Browse** button and select the desired contract zip file.
3. Click the **OK** button.
4. If no DWR files are to be converted, click the **None** button.
Or
5. Click the **Browse** button and select the desired DWR zip file.
6. Click the **OK** button.
7. If no reference files are to be converted, click the **None** button.
Or
8. Click the **Browse** button and select the desired reference zip file.
9. Click the **OK** button.
10. In the **Available User** list, click the user ID(s) of one or more recipients of the converted data.
11. Click the **Add** button.
12. To remove users from the Selected Users box, click the appropriate user ID and click the **Remove** button.
13. Click the **Export** button.
14. When complete, click the **Done** button.

4.5 Synchronizing Data

Converted files are placed in the Palm upload directory for upload onto the handheld device at the next synchronization session.

TIP: For best results, Palm, Inc. recommends using Palm Desktop version 4.0 (available for download at <http://www.palm.com>) when using any Palm-manufactured device.

To upload SiteManager data to SitePad:

1. Place the handheld device in the synchronization cradle.
2. Press the **synch** button on the cradle.

4.6 After Synchronization

To avoid the situation of having a Daily Work Report locked on the server while being used for reference purposes on SitePad, the following procedure must be followed.

After the DWR zip file has been used in the creation of the Palm database, the DWR zip file should be returned to the SiteManager standalone database using the PM/Inspector Load function. From the SiteManager standalone database, the DWR may then be pipelined to the server, unlocking the DWR and allowing it to be included in diaries and estimate, even though a "ghost" copy still resides in the Palm database.

5. Recording Daily Work Report Data

November 2001

5.1 Overview

Before any information may be recorded about a contract in SitePad, the basic contract data must be loaded into the SitePad database. More concerning this procedure is detailed in Section 4: The SitePad Conduit.

5.2 Creating a Daily Work Report

Once data has been downloaded from SiteManager to the SitePad application, the user may begin to record Daily Work Report data in SitePad. The DWR Info form will be the first form displayed upon logon. If multiple contracts are loaded into the handheld device, the form will display blanks, with the date set to the current date. If a DWR already exists for the current date, then the data for that DWR is displayed.

The Contract field is a drop down list which contains the same list of contracts shown on the Contracts form. The field initially displays the currently selected contract. If a user selects a different contract from the list, then the DWR for the selected contract for the same date is displayed. If there is no DWR for this date for the newly-selected contract, one is created.

If data has already been added to the DWR, the appropriate button will have chevrons (<< >>) surrounding the button label.

DWR Info	
Contract	▼ 000421-302
Date	8/28/01
Authorized On	
Suspend Time	12:00 am
Resume Time	12:00 am

The DWR Info Form
Figure 5-1

FIELD	DESCRIPTION
Contract	Displays the currently selected contract ID. When the down arrow to the left of the contract ID is tapped, a drop down list of contract IDs appears and may be selected from.
Date	The date for which Daily Work Report information is recorded.
Authorized On	If the Daily Work Report has been Authorized, this field displays the date of on which the Daily Work Report was authorized in a Diary. This field is read-only.
Suspend Time	The time construction activity stopped. Must be before the resume time. This may be left blank if no suspension of work occurred on this day.
Resume Time	The time construction activity resumed. Must be after the suspend time. This may be left blank if no suspension of work occurred on this day.

DWR Info Fields
Table 5-1

5.2.1 Selecting a Contract

The screenshot shows the 'DWR Info' form on a handheld device. The 'Contract' field is open, displaying a drop-down list with three options: 'Train_37', 'Train_38', and 'Train_39'. Below the list is a small downward arrow icon. Other fields on the form include 'Date', 'Authorized on', 'Suspend time', and 'Resume time', each with a 'Set' button. At the bottom, there are buttons for 'Staff', 'Weather', 'Contractors', 'Remarks', 'New', 'Copy', and 'Delete'.

The Contract Drop Down List
Figure 5-2

Before Daily Work Report information can be successfully recorded on the handheld device, the contract must be selected. This may be done in either of two methods - through a drop down list on the DWR Info form or through the Contract List option on the Forms menu.

To select a contract to create a new or copy an existing DWR:

1. In the **Contract** droplist, click the expand arrow (▼) to the left of the current selection and click the desired choice.
2. Tap the ID of the desired contract.

OR

1. Tap the **Menu** icon and tap the **Contract List** choice in the Forms menu.
2. Tap the ID of the desired contract.
3. Tap the **DWR** button.

Tip: Only those contracts whose basic contract data has been downloaded into the hand-held device will be available in the Contract List form.



The Contract List Form
Figure 5-3

The Contract List form also enables the user to select the contract for which information is to be recorded. The Details functionality also allows the user to view read-only data such as the Contract ID, Vendor, Fed/State Project number, Status, County, Office, and Description. Functions associated with the Contract List form are detailed in the table below.

FUNCTION	DESCRIPTION
DWR	After a contract ID has been selected, tapping on this button opens the DWR status form, allowing Daily Work Report data to be entered.
Details	Displays a read-only form that details the Contract ID, Vendor, Project, Status, County, Office, and Description of the Contract.
Find	Similar to SiteManager's Find function, this option allows the user to find a particular contract, or specify filter criteria for a single field.

Contract List Form Functions
Table 5-2

5.2.1.1 Viewing Contract Details

The Details function on the Contract List form allows users to view information concerning the chosen contract.

To view Contract Details:

1. Tap the **Menu** icon and tap the **Contract List** choice in the Forms menu.
2. Tap the desired contract ID.
3. Tap the **Details** button.

The Contract Details Form
Figure 5-4

FIELD	DESCRIPTION
Contract ID	Transportation agency-defined ID for the contract.
Vendor	The prime contractor for the contract.
Project	The primary project number of the contract.
Status	Indicates the current status of the contract (i.e. Pending, Active, Complete, or Archived).
County	The contract's primary county. The county in which most of the work will be performed.
Office	Office number of the district office responsible for administering the contract.
Description	A brief textual description of the contract.

Contract Details Fields
Table 5-3

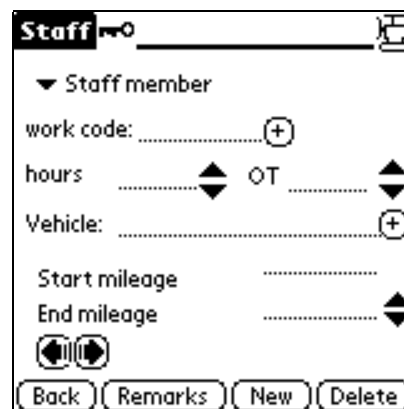
5.2.2 Copying an Existing Daily Work Report

Contractor and Daily Staff information may be copied from an existing DWR to a new DWR, including any associated remarks.

To copy an existing Daily Work Report:

1. Tap the **Menu** icon and tap the **Contract List** choice in the Forms menu.
2. Tap the desired Contract ID.
3. Tap the **Menu** icon and tap the **DWR List** choice in the Forms menu.
4. Tap the desired DWR date. The DWR opens.
5. Tap the **Copy** button.
6. Tap the **Date** field and input the new date.

5.3 Recording Daily Staff

The screenshot shows a mobile application interface titled "Staff" with a dropdown arrow and a printer icon. Below the title is a dropdown menu labeled "Staff member". The form contains several input fields: "work code:" followed by a plus icon in a circle; "hours" followed by a double-headed vertical arrow and "OT" followed by a double-headed vertical arrow; "Vehicle:" followed by a plus icon in a circle; "Start mileage" followed by a dotted line; and "End mileage" followed by a dotted line and a double-headed vertical arrow. At the bottom left are two circular icons with arrows. At the bottom are four buttons: "Back", "Remarks", "New", and "Delete".

The Daily Staff Form
Figure 5-5

The Daily Staff form lets the user enter daily information for state employees and consultants. A staff member can be entered more than once per DWR with a different work code. Each entry shows how many hours the staff member worked, the type of work performed, and if a state vehicle was used. If a state vehicle was used, its identification number must be recorded along with its starting and ending miles. The user selects staff members from the drop-down list in the Staff Member field. The user may also enter remarks for each Staff Member recorded. If the Staff Member already has remarks recorded on the current DWR, the Remarks button will have a small square indicator to the left of the button label.

FIELD	DESCRIPTION
Staff Member	A drop-down list of names of state employees or consultants who work on the contract.
Work Code	Transportation agency-defined code that identifies work activities, including sick time and vacation. This field is required if there is more than one entry for the same individual.
Hours	The number of regular pay hours worked by the staff member for the time period. The default value is 8. This field is required.
OT	The number of overtime pay hours worked by the staff member for the time period. The default value is 0. This field is optional.
Vehicle	The license number or other ID for a state vehicle used by the staff member. Required if a vehicle was used.
Start Mileage	The beginning mileage for the vehicle used by this staff member for the day. Required if a vehicle was used. The Start Mileage should be less than the End Mileage.
End Mileage	The ending mileage for the vehicle used by this staff member for the day. Required if a vehicle was used. The End Mileage should be greater than the Start Mileage.

Daily Staff Form Fields
Table 5-4

To add a staff member to a Daily Work Report:

1. On the DWR Status form, tap the **Staff** button, then tap the desired Staff member.
2. In the **Staff Member** drop-down list, tap the expand arrow (▼) to the left of the current selection and click the desired staff member.
3. Tap the **Work Code** field and input the desired text.
4. Tap the **Hours** field and input the desired number.
5. Tap the **OT** field and input the desired number.
6. Tap the **Vehicle** field and input the desired text.
7. Tap the **Start Mileage** field and input the desired number.
8. Tap the **End Mileage** field and input the desired number.
9. If desired, tap the **Remarks** button, tap the first blank line, and input the desired remarks information.
10. Tap the **Back** button.
11. Tap the **Back** button again to return to the DWR Status form.

5.4 Recording Contractor Information

The Contractors Form

Figure 5-6

The Contractors form allows the user to enter daily data on the Contractor, Supervisor(s), variable labor (by Personnel type), Equipment, and installed work Items. The Contractors form lists each contractor assigned to the contract. When the user creates a Daily Work Report, the user can copy the Contractor information from the last opened DWR for the Contract. If the user chooses not to copy the Contractor information, the user can select the Contractor from a list of Contractors and Subcontractors who are authorized to work on the Contract. The Prime Contractor is always at the top of the Contractor list. The remainder of the list is sorted alphabetically by Contractor ID.

Note: Subcontractors associated with the contract will not appear in this list unless an Approval Date for the subcontract has been entered in SiteManager's Subcontracts form. If Subcontract data has been entered since the download of basic contract data into SitePad, the user will be unable to access this information until another download of basic contract data is done.

The user must select a Contractor before entering information related to the Contractor or before recording work items. After selecting a Contractor, the user can select Supervisors and Personnel Types associated with the selected Contractor.

FUNCTION	DESCRIPTION
Supervisors	Displays the Supervisors List for the selected contractor.
Personnel	Displays the Personnel type list for the selected contractor.
Equipment	Displays the Equipment list for the selected contractor.
Items	Displays the Work Items list for the selected contractor.

Contractors Form Functions

Table 5-5

5.4.1 Supervisors



The Supervisors List Form

Figure 5-7

The Supervisors list displays all of the supervisors who work for the selected Contractor. After selecting a supervisor, the user can record the number of hours worked by the supervisor. The user may also enter remarks for each supervisor.

The Supervisor Details form displays information for the selected supervisor for the currently selected DWR. If the DWR is not locked, the data displayed on the form may be changed by the user. If there is a remark recorded for the current supervisor, the remarks button will indicate this with a small black square.

To record Supervisor information:

1. On the Contractor form, tap the desired contractor, then tap the **Supervisor** button.
2. Tap the desired Supervisor. The Supervisor Details form appears.
3. In the **Supervisor** drop-down list, click the expand arrow (▼) to the left of the field label and click the desired Supervisor.
4. Tap the **Hours** field and input the number of hours worked.
5. Tap **OK**.
6. If desired, tap the **Remarks** button, tap the first blank line, and input the desired remarks information.
7. Tap the **Back** button.
8. When finished entering Supervisor data, tap the **Back** button to navigate back to the Contractor form.

The Supervisor Details Form
Figure 5-8

FIELD	DESCRIPTION
Select Supervisor	A drop-down list of all supervisors for this contractor.
Hours	The number of hours worked for this supervisor.

Supervisor Details Form Fields
Table 5-6

5.4.2 Personnel

The Personnel Form
Figure 5-9

The Personnel type list displays all of the non-supervisory personnel types who work for the currently selected contractor. This list is also referred to as the *variable labor list*. The user can record the number of workers present for each personnel type. For example, the user can record the number of painters present for the Prime Contractor. The user may also enter remarks for each personnel type used.

The Personnel Details form displays the information for the selected personnel class for the current DWR. If a remark is recorded for the current personnel class, the remarks button will have a small indicator to the left of the remarks button label.

To record Personnel type information:

1. On the Contractor form, tap the name of the desired contractor, then tap the **Personnel** button.
2. Tap the desired Personnel type. The Personnel Details form appears.
3. In the **Select Personnel** drop-down list, tap the expand arrow (▼) to the left of the field name and click the desired personnel type.
4. Tap the **Hours** field and input the number of hours worked.
5. Tap the **Number** field and input the number of personnel of that type.
6. Tap **OK**.
7. If desired, tap the **Remarks** button, tap the first blank line, and input the desired remarks information.
8. Tap the **Back** button to return to the Personnel form.
9. When finished entering Personnel data, tap the **Back** button to navigate back to the Contractor form.



The Personnel Details Form
Figure 5-10

FIELD	DESCRIPTION
Select Personnel	A drop-down list of all personnel types associated with the current contract and the current contractor.
Hours	The number of hours worked by this personnel type. Hours cannot be recorded until the number of persons is greater than zero.
Number	The number of persons of the selected personnel type who worked on this date for the selected contractor. The number of persons must be greater than zero.

Personnel Details Fields
Table 5-7

5.4.3 Equipment

The screenshot shows a mobile application interface for the 'Equipment' form. At the top, there's a title bar with the word 'Equipment' and a small icon on the right. Below the title bar is a list of equipment types, currently showing 'Trencher' and 'Truck'. The list is contained within a rectangular frame. At the bottom of the frame, there are two buttons: 'Back' on the left and 'New' on the right.

The Equipment Form
Figure 5-11

The Equipment form allows the user to document the presence and use of equipment on the job site for the selected Contractor. The user enters the number of pieces of each equipment type on the site on this date, the number of pieces used, and the number of hours each equipment type was used. The user may also enter remarks for each piece of equipment used. The user must select a Contractor before entering equipment information for the Contractor.

After the user selects a Contractor, the user can select equipment from the list on the Equipment form.

To record Equipment information:

1. On the Contractor form, tap the desired contractor, then tap the **Equipment** button.
2. Tap the desired equipment description. The Equipment Details form appears.
3. In the **Select Equipment** drop-down list, tap the expand arrow (▼) to the left of the field name and tap the desired equipment description.
4. Tap the **Number** field and input the number of equipment pieces on-site.
5. Tap the **Number Used** field and input the number of equipment pieces that were actually used.

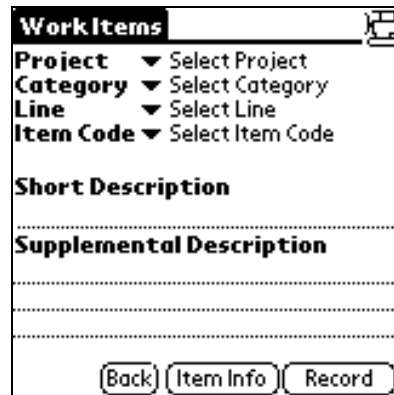
6. Tap the **Hours** field and input the number of hours the equipment was used.
7. Tap **OK**.
8. If desired, tap the **Remarks** button, tap the first blank line, and input the desired remarks information.
9. Tap the **Back** button to return to the Equipment form.
10. When finished entering Equipment data, tap the **Back** button to navigate back to the Contractor form.

The Equipment Details Form
Figure 5-12

FIELD	DESCRIPTION
Select Equipment	A drop-down list of all equipment associated with the current contract and the current contractor.
Number	This field is used to record the quantity of an equipment type. The equipment quantity must be greater than zero before the number used can be recorded.
Number Used	Identifies how many pieces of the equipment type were used that day. The Number Used cannot be greater than the Number.
Hours	Number of hours the vehicle or equipment was used on that day. The equipment quantity used must be greater than zero before equipment hours can be recorded.

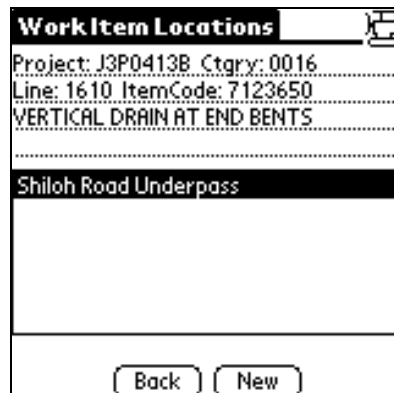
Equipment Details Fields
Table 5-8

5.5 Recording Work Items



The Items Form
Figure 5-13

The Item List form allows the user to view and add daily installed Work Items. Before entering Work Item data, the Contractor responsible for the Work Item must be selected on the Contractors form. When the user first selects the Work Items folder tab, the Work Item list for the selected contractor is displayed. To enter installed work data for an item, the user taps the Work Item desired. This displays the Item Locations form on which the User can select the location in which the item was installed. Selecting the desired location displays the Item Location form where the user can view and add daily installed work data.



The Item Location List Form
Figure 5-14

To record a Work Item:

1. On the Contractor form, tap the desired contractor, then tap the **Work Items** button.
2. Tap the desired item description.
3. Tap the down arrow (▼) to the left of the **Project** field and tap the desired selection.
4. Tap the down arrow (▼) to the left of the **Category** field and tap the desired selection.
5. Tap the down arrow (▼) to the left of the **Line** field and tap the desired selection.
6. Tap the **Record** button.
7. Tap the **New** button.

8. Tap the **Quantity** field and enter the quantity installed.
9. Tap the **Plan Page Number** field and enter the desired information.
10. Tap the **Seq/Location** field and enter the Location of the installed work.

WorkItem Location

Project: J3P0413B Ctry: 0016

Line: 1610 ItemCode: 7123650

VERTICAL DRAIN AT END BENTS

Quantity

Plan Page No

☐ Measured

Seq/Location 2

Back Delete Stationing New Remarks

The Item Location Form
Figure 5-15

FIELD	DESCRIPTION
Item Code	The transportation agency-defined code that identifies a particular item.
Quantity	Quantity of the work item installed on this date. This is a required field.
Plan Page No	Plan page number on which the Work Item is included.
Measured	If checked, indicates that the installation location of this Work Item was measured.
Location	Location where the Work Item was installed. An Item can be installed at multiple locations. (This description does <i>not</i> have to be unique for each entry.) This is a required field.

Item Location Fields
Table 5-9

5.5.1.1 Entering Stationing Information

The Stationing Form
Figure 5-16

If stationing information about an installed work item is to be recorded, it must be entered on the Stationing form. The Stationing form is reached through tapping the Stationing button on the Item Location form.

FIELD	DESCRIPTION
From	Station ID that identifies where the installation of this Work Item starts.
(From) Offset	Offset from the Station ID that identifies where the installation of this Work Item starts.
(From) Distance	Distance of the offset from the Station ID that identifies where the installation of this Work Item starts.
To	Station ID that identifies where the installation of this Work Item ends.
(To) Offset	Offset from the Station ID that identifies where the installation of this Work Item ends.
(To) Distance	Distance of the offset from the Station ID that identifies where the installation of this Work Item ends.

Stationing Form Fields
Table 5-10

To enter Stationing Information:

1. From the Work Item Location form, tap the **Stationing** button.
2. Tap the **From** field and input the Station ID that identifies where the installation of this Work Item starts.
3. Tap the **Offset** field and input the offset from the Station ID that identifies where the installation of this work item starts.
4. Tap the **Distance** Field and input offset distance from the Station ID that identifies where the installation of this Work Item starts.

5. Tap the **To** field and input the Station ID that identifies where the installation of this Work Item ends.
6. Tap the **Offset** field and input the offset from the Station ID that identifies where the installation of this work item ends.
7. Tap the **Distance** Field and input offset distance from the Station ID that identifies where the installation of this Work Item ends.
8. When finished entering stationing data, tap the **Back** button to return to the Item Location form.

5.5.1.2 Viewing Item and Stockpile Information

When recording Work Item information, it is sometimes necessary to view additional item data, including information about stockpiles and quantities previously installed. This information is read-only in SitePad, and what data is viewable may depend upon the individual user's security setup. For more information on the topic of SitePad Security, please refer to the SitePad System Manager's Guide or the SiteManager Reference Manual.

Work Item Info - 1	
Item Code	27505
TEMP. SILT FENCE	
Project	00025861N01
Line Item	0060
Category	0005
Unit Price	2.26000
Status	0^
Pay To Plan Quantity?	N
<input type="button" value="Back"/> <input type="button" value="More..."/> <input type="button" value="Stockpiles"/>	

The Item Info 1 Form
Figure 5-17

To view Item Information:

1. On the Work Items form, tap the **Item Info** button. The Item Info 1 form displays.
2. To view additional Item Information, tap the **More** button. The Item Info 2 form displays.
3. To return to the Item Info 1 form, tap the **More** button.
4. To return to the Item Location form, tap the **Back** button.

FIELD	DESCRIPTION
Item Code	The transportation agency-defined code that identifies a particular item.
Description	A short textual description of the item.
Project	The transportation agency-defined ID for the project.
Line Item #	The Contract Line Item Number that identifies each Item as it appears on the Contract.
Category #	A grouping of items assigned during pre-construction. Items can be grouped within categories for various reasons, primarily for funding.
Unit Price	The unit price of the Item; identified on the invoice and Contract documents. This field may or may not be visible
Status	Identifies the current status of the Contract Item (i.e., Active, Audit, Final, Complete, Pending, None).

Item Info 1 Form Fields
Table 5-11

Work Item Info - 2

Item Code 27505
TEMP. SILT FENCE

Qty. Installed 0

Bid Quantity 500,000

Qty Paid 0

Contract Qty 500

Unit Type LF

Back **More...** **Stockpiles**

The Item Info 2 Form
Figure 5-18

FIELD	DESCRIPTION
Item Code	The transportation agency-defined code that identifies a particular item.
Qty Installed	The quantity of the material installed to date. This value is calculated by SiteManager's estimate generation process.
Bid Quantity	This is the original quantity of the line item, as indicated on the proposal or Contract. Must be greater than zero. Must be equal to one, if the item's unit of measure is Lump Sum.
Qty Paid to Date	The total number units that have been paid to date for the Line Item.
Current Contract Qty	Bid contract plus approved quantities. This field is display only.
Unit Type	The unit of measure for this item.

Item Info 2 Form Fields
Table 5-12

Work Item Info - 3

Item Code 27505

Short Description
TEMP. SILT FENCE

Supplemental Description

Back More... Stockpiles

The Item Info 3 Form
Figure 5-19

FIELD	DESCRIPTION
Item Code	The transportation agency-defined code that identifies a particular item.
Short Description	The short description defined for this work item by the transportation agency.
Supplemental Description	If necessary, a supplementary description is assigned by the transportation agency.

Item Info 3 Form Fields
Table 5-13

5.5.1.2.1 Viewing Stockpiles

Item Stockpiles information may also be viewed in SitePad, depending on the individual user's security setup. Stockpile information is read-only in SitePad.



The screenshot shows a software window titled "Item Stockpiles- 1" with a standard Windows-style title bar. Inside the window, there is a form with several text input fields, each followed by a dotted line indicating where to type. The fields are labeled: "Matl Code", "Description", "Status", "Invoice date", "Invoice #", "Quantity", and "Units". At the bottom of the form, there are three buttons: a left arrow button, a right arrow button, and a "More..." button.

The Item Stockpiles 1 Form
Figure 5-20

FIELD	DESCRIPTION
Matl Code	The transportation agency-defined ID for the material.
Description	A short textual description of the material
Status	The status of a stockpiled material is either Open, Active, or Closed. New materials are given Open status. Materials included on an estimate are given Active status. When a balance is closed out, the material is given Closed status.
Invoice Date	The date of the invoice.
Invoice #	Identifies the invoice with which the material was received.
Quantity	Number of units received.
Units	Description of the unit of measure for the material.

Item Stockpiles 1 Form Fields
Table 5-14

To view Item Stockpiles information:

1. From the Item Info form, tap the **Stockpiles** button. The Item Stockpiles 1 form displays.
2. To view additional Item Stockpile information, tap the **More** button. The Item Stockpiles 2 form displays.
3. To return to the Item Stockpiles 1 form, tap the **More** button.
4. To return to the Item Info 1 form, tap the **Back** button.

The Item Stockpiles 2 Form
Figure 5-21

FIELD	DESCRIPTION
Unit Price	The unit price of the material, as identified on the invoice. The contents of this field will be visible only if the SitePad user has been assigned security access to view Unit Pricing.
Conv Factor	The conversion factor is derived from the Contract Line Item information. It is

	the number of units of the material used in one unit of the line item.
Invoice Amt	The system-calculated product of the Material Quantity and the Unit Price.
Initial Invoice Pmt	The initial payment to be applied to the invoice upon generation of the first estimate for the stockpiled material. This value cannot be more than the Invoice Amt.
Matl#	The stockpiled material sequence number. Each time a stockpiled material is entered, it will receive a material sequence number. The first stockpiled material record will be assigned the number one (1) for the material sequence number, and subsequent material sequence numbers (for each newly-created stockpile record) will increase by increments of one (1).
Repl#	The replenishment sequence number. Each time a stockpile is replenished, SiteManager copies the existing stockpile information to a new stockpile record. The first replenished stockpile will be assigned the number zero (0) for the replenishment sequence number, and subsequent replenishment sequence numbers will increase by increments of one (1).
Remaining Qty	The quantity of material that remains. Calculated as the difference between quantity and installed quantity to date. May be zero if the project is closed or the contract is ended.
Installed Qty	The quantity of the material installed to date. This value is calculated by SiteManager's estimate generation process.
Paid to Date	The amount that has been paid for the stockpiled material to date. This value is calculated by SiteManager's estimate generation process.

Item Stockpiles 2 Form Fields
Table 5-15

5.6 Recording Weather and Weather Conditions

The Weather form provides fields for entering high and low temperatures as well as AM and PM conditions. The values listed in the AM and PM drop-down lists are transferred from SiteManager.

The Weather Form
Figure 5-22

FIELD	DESCRIPTION
High Temperature	The high temperature recorded for the workday. The high temperature must be higher than the low temperature, and is required.
Low Temperature	The low temperature recorded for the workday. The low temperature must be lower than the high temperature, and is required.
AM Conditions	A drop-down list from which the user selects the significant weather condition for the morning (i.e. Rain, Snow, Cloudy, Sunny, etc.). This field is required.
PM Conditions	A drop-down list from which the user selects the significant weather condition for the afternoon. This field is required.

Weather Form Field Description
Table 5-16

To record daily weather conditions:

1. From the DWR Status form, tap the **Weather** button.
2. Tap the **High Temperature** field and input the desired high temperature.
3. Tap the **Low Temperature** field and input the desired low temperature.
4. In the **Select AM Conditions** drop-down list, tap the expand arrow to the left of the field name and tap the desired AM weather condition.
5. In the **Select PM Conditions** drop-down list, tap the expand arrow to the left of the field name and tap the desired PM weather condition.
6. When finished entering weather information, tap the **Back** button to return to the DWR Status form.

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6. Check In

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Forms	Edit	Actions	Options
<div> <div>Contract</div> <div>Exit SitePad</div> <div>Mark DWR to check in</div> </div>			
Date	8/28/01	Set	
Authorized On			
Suspend Time	12:00 am	Set	
Resume Time	12:00 am	Set	
Weather		Remarks	
Contractors		Staff	
New		Copy	

The Actions Menu
Figure 6-1

6.1 Checking In Daily Work Reports

Before Daily Work Report information can be sent from the handheld device to the SiteManager database, the individual Daily Work Report must be marked for checking in. Once a DWR has been marked for Check-In, it cannot be changed and is locked on the handheld device.

When a DWR is marked for Check-In, it is locked against further changes, and will be checked in upon the next synchronization with SiteManager. If the current DWR has been edited or created but not yet saved, marking it for Check-In will automatically cause it to be saved.

To mark the current Daily Work Report for check in:

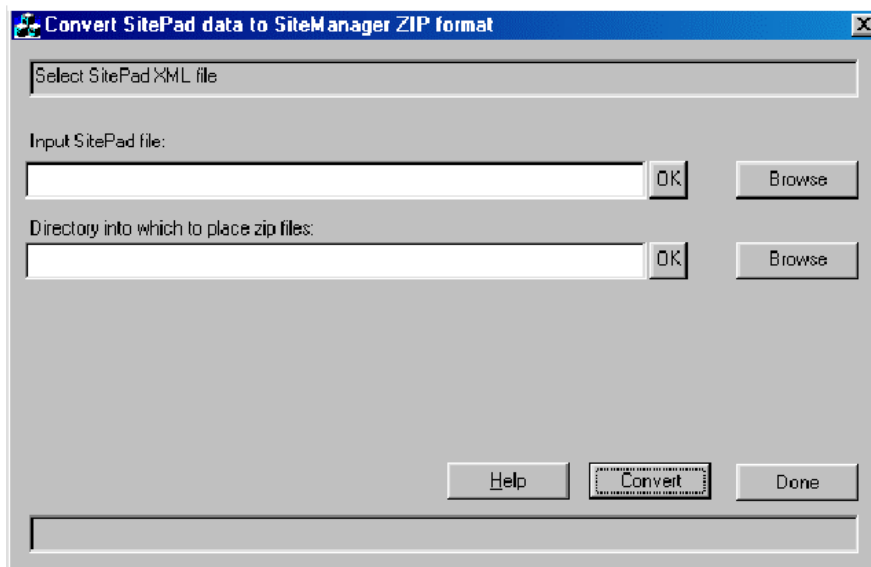
1. Open the Daily Work Report.
2. Tap the **Menus** icon, tap the **Actions** menu and tap the **Mark DWR to check in** choice.

6.2 Synchronizing Data

Files from the handheld device must be uploaded to the PC via the synchronization program. Files are placed in the Palm download directory, where they may be accessed for conversion from XML to ZIP format.

To download SitePad data to the PC for conversion:

3. Place the handheld device in the synchronization cradle.
4. Press the **synch** button on the cradle.



Make ZIP Conversion Program
Figure 6-2

6.3 Use Make Zip

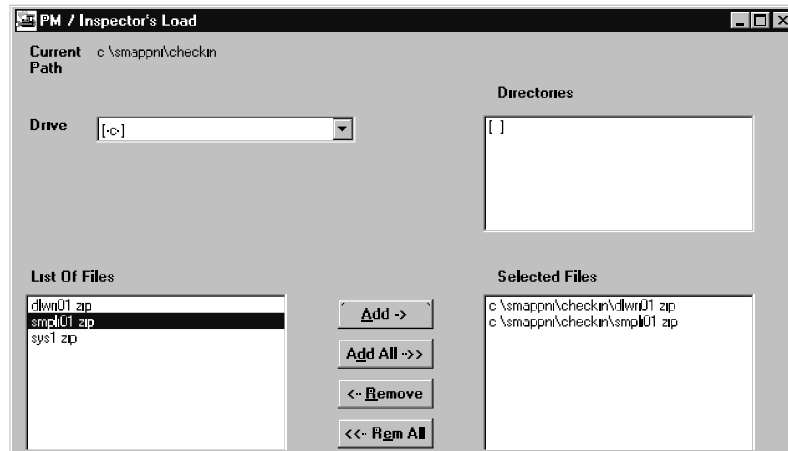
In order for SitePad XML files to be uploaded to SiteManager, the files must first be chosen by the user and converted to the appropriate SiteManager file structure.

The program that converts SiteManager zip files to SitePad data is called Make Zip'. It allows the user to select XML files containing data to be transferred from SitePad to SiteManager.

Once the XML files have been converted, the user is prompted to begin the conversion process again. The process may be repeated as many times as necessary. When the conversion process is complete, the user clicks the Done button to exit the program.

To convert SitePad data to SiteManager data:

1. Click the **Start** menu, click the **Programs** choice, click the **SitePad 1.0a** choice, and click the **Make Zip** choice.
2. Click the 'Input SitePad file' field.
3. Click the **Browse** button and select the desired XML file.
4. Click the **OK** button.
5. Click the 'Directory into which to place zip files' field and type the path for the zip file directory **OR** click the **Browse** button and select the desired directory.
6. Click the **Convert** button.
7. If desired, select additional XML files for conversion **OR** click the **Done** button to exit the program.



The PM/Inspector's Load Panel
Figure 6-3

6.4 Check In — Loading Zip Files

The PM/Inspector's Load panel lets the user unzip and load files from SitePad into the database. The PM/Inspector's Load panel loads the following file types to the standalone database from SitePad:

DWR files DLWR00.ZIP

The PM/Inspector's Load panel opens with a default drive and directory, which the user can change. The List of Files box displays all files with the .zip extension for the selected drive and directory. After the user selects the files, the Services menu Load Files option loads these files into the database.

To load DWR and Sample and Test zip files into the standalone database:

1. When logging on to SiteManager, connect to the standalone database.
2. On the **Pipeline and Zip** panel, double-click the **PM/Inspector's Load** icon.
3. In the **Drive** drop-down list, select the directory in which the zip files are located.
4. In the **Directories** list box, scroll to and click the directory in which the zip files are located. The filenames in the selected directory are displayed in the List of Files
5. In the **List of Files** list box, scroll to and click the filename(s).
6. Click the **Add** button. The files selected in the List of Files are added to the Selected Files list.
7. Click the **Services** menu and click the **Load Files** choice. The selected files are unzipped and loaded into the standalone database.

The PM to Server Pipeline Summary Folder Tab
Figure 6-4

6.5 Check In — Uploading Data to the Server

The PM to Server Pipeline panel lets the Project Manager/Inspector upload (check in) data from the standalone database to the server. When logging on to SiteManager, the Project Manager/Inspector must connect to the server database. The pipeline process transfers the selected data directly from the Project Engineer's standalone database to the server database.

To upload data to the server:

1. When logging on to SiteManager, connect to the server database.
2. On the **SiteManager** main panel, double-click the **Pipeline and Zip** icon.
3. On the **Pipeline and Zip** panel, double-click the **PM to Server Pipeline** icon. The Pipeline Summary folder tab is displayed.
4. To select a Contract, click the **Open** button.
5. In the **Contract ID** list box, scroll to and double-click the Contract.
6. In the **DWR** list box, shift-click each Daily Work Report to be uploaded.
7. Click the **Add** button. The selected Daily Work Reports are added to the **Selected DWRs** list.
8. To select Samples, click the **Sample/Test Select** folder tab.
9. Click the **Pipeline Summary** folder tab.
10. To upload the selected data to the server, click the **Services** menu and click the **Pipeline Data** choice.

6.6 Deleting a Contract Database

Unlike SiteManager, you never 'Check In' the contract. Since each contract on the handheld is a separate database, you merely delete the contract database.

However, it is very important the all DWR on the handheld be successfully checked in before removing the contract. Any DWR not checked in will be lost if the database is deleted.

To delete a contract database:

1. At the main Palm screen, tap the **Menus** icon, tap the **App** menu and tap the **Blah** choice.
2. Tap the contract database to be deleted.
3. Tap the **Delete** button.
4. Tap the **Yes** button to confirm deletion

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Deleting a Contract Database

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